epicor

What's New in Kinetic

Version 2022.2

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What's New in This Release

Here's a listing of new features and enhancements we rolled out with this release.

User Experience (UX) Transformation

General User Experience (UX) Improvements

Feature	Benefit
We're constantly working to improve your Kinetic experience, here's a summary of what has changed: • You can now log into Kinetic using **multiple authentication modes**. Log in using Basic, Epicor Identity Provide (IdP), and Azure. Review the help article Kinetic Login Options for more information. • Change how many records automatically populate grids as you scroll down them. When you access a grid's **Selection Options**, change the **Select All Maximum** field to increase or decrease the number of records you want to load into grids. Review the help article Personalized Searches for more information. • When you display the **Personalize Columns** panel for a grid, the active columns display in the same order as they appear on the grid. The column name within the table also appears below the caption. • As you personalize columns on a grid, use the **Search** field to quickly locate a column. Active columns that match your search value display first, followed by the inactive columns. The inactive columns display in alphabetical order. Review the help article Grid Personalization - Column list for more information. • When you display two or more panels, use the **slider** control on the panel's left edge to change the width of the top panel. When you click outside the panels, only the top panel closes. Review the help article	The new UX enables fast access to information with a modern clean layout, while simplifying everyday tasks.

Feature	Benefit
Creating In-App Sliding Panels for more information. • Locate a record and its related fields by entering a value in the **Search** field and pressing Enter. If the system cannot find the record, an error message displays. • The **Hero Bar** now adjusts as you expand or contract your browser. As you make the browser smaller, each node on the Hero bar changes to an Overflow icon. Select this icon to see this node's information. Review the help article Working with Kinetic Applications for more information. • The **Export to Excel** process is now run by the server instead of the client. When you export the contents of a grid, you then download this exported file from the **Notifications** panel. • If you attempt to switch to the **Home Page** before saving a record, the system asks if you would like to save before moving onto the Home Page. Review the help article Using Report Options, Filters, and Advanced Settings for more information.	

ICE Framework Transformation

Feature	Benefit
We're constantly working on transformation of ICE framework features that impact across all UIs. Here's a summary of what has changed: • **Language Import Process** - Import language files using this process application. Review the Importing Languages help article to learn more. • **External Datasource Type Maintenance** - Create external datasource types to set up security restrictions to schema and data from an external database. Review the	As more applications move to the Kinetic interface, you can leverage previous Classic only functions within your Kinetic browser environment.

Feature	Benefit
Creating External Datasource Types help article for details. • **External Datasource Maintenance**- You create external datasources that external business activity queries (BAQs) use to pull data from an external database. Learn more by reviewing the Entering External Datasources help article. • **External Datasource Metadata Maintenance** - Change the properties for columns that come from an external datasource. This makes sure external data displays in the correct data format, label, and other metadata properties. Review the Entering External Datasource Metadata help article to learn more.	

Application Studio

Basic Application Wizard

Feature	Benefit
Run the **Basic Application Wizard** to step through creating a single page application. The wizard guides you through setting up the application's layout, events and data views. During runtime, this single page application can show you specific information you need. It can also become the base application that you develop further through customized layers in Application Studio. Review the Working With the Basic Application Wizard help article for more information.	Use the Basic Application Wizard to: • Select one or multiple dataviews. • Define the publish and subscribe relationships between dataviews. • Add static filters to the dataviews. • Set up multiple cards. • Set up multiple grids. • Decide which columns display in each grid. • Indicate if users can enter data in selected columns. • Use a Nav Tree to view and analyze the data relationship before creating the single page application.

Application Studio Homepage

Feature	Benefit
The Application Studio Homepage now includes these features: • The grid shows each layer on a separate row sorted by the Application ID. Previously these layers were nested under each base application row. You needed to expand this row to see the child layers. • Use the **Layer Name** field to see whether the layer is a base or custom layer. Click this link to launch Application Studio and work on the selected layer. • Review the **Type** column to determine if this layer is for an application, configurator, or a dashboard.	Use the Application Studio Homepage to more easily locate base and custom layers. You can also see which layers are published and which layers have unpublished drafts. You can also publish several layers at the same time.

Feature	Benefit
• Review the **Has Draft** column to see if the layer has a version that has not been published to the system. • Review the **Published** layer to verify that the layer is available for display on the user interface. • Select multiple layers to publish them at the same time. After you select the layers, click the **Overflow** menu and then **Publish Selected Layers**. Learn more about how to use these features in the Using Application Studio Homepage help article.	

Application Studio Enhancements

Feature	Benefit
This release includes several enhancements to Application Studio: • Now when you launch Application Studio from either an application for the Application Studio Homepage, it opens on a separate tab on your browser. To learn more, review the Launching Application Studio help article. • **Dashboard Developer** rights are now available for user accounts. Users with these rights are limited to only creating dashboards within Application Studio. Review the Adding New Users in User Account Maintenance help article for more information. • Classic dashboards you generate into the Kinetic UX can now show web sites within card components. To learn more, review the Modifying Kinetic UX Dashboards help article. • Create events that updates data within a	Use these improved Application Studio features to design more effective custom application layers.

Feature	Benefit
Business Activity Query (BAQ). Through these events you can add, update, and validate data entered in a BAQ. To learn more, review the Using the ERP-BAQ Event Action help article. • You can now enter changes directly on a grid, such as changing the column order and widths as well as selecting which columns appear on the grid. These changes then save and display on the published layer. To learn more, review the **Grid / Grid Panel Card** section within the Component Reference help article. • Select the **Summaries** you want to display on a BAQ. You can display Average, Count, Sum, and so on. Learn more by reading the **Showing Summaries** section within the Working with Grids help article. • Group together records within a BAQ. You can now drag a column into the **Group By** area to organize the rows by the values in this column. **Review the Using Group By** section within the Working with Grids help article. • The **Flex Layout** feature is improved to more easily adjust the width of panel cards and group boxes for side by side layouts. Set this Minimum Width value directly to see how this changes the layout. Review the **Using Flex Layout** section within the Modifying Application Structure help article to learn where to find this property and how to use it. • It is now easier to drag and drop components inside nested containers. You can precisely place these components where you want them to appear within the layout.	

Feature	Benefit
- Select the **Use Full Width** property to cause a custom application to expand across the entire width of the user's monitor. Read the Modifying Application Structure help article for details. - Use the **Save As** option to save a layer to a different target company. This layer is then available for use in the target company. For more information, review the Using the Save As Option help article. - Launch a **Debug Tool** that displays the log and data updates and that occur while your custom layer or application runs. Use this tool to debug issues and test the custom application or layer. To learn more about this tool, review the **Using the Debug Tool** section within the Debugging Applications help article.	

Kinetic Software Developer Kit SDK)

Feature	Benefit
Use the Kinetic Software Developer Kit (SDK) to add new services to the system. These services have their own sets of tables and basic methods. After you generate the service, launch Application Studio to add the events and design the user interface for the new service. Use Business Process Management (BPM) directives to determine the default actions the service runs. You can also extend the available methods by creating Epicor Functions that handle unique tasks. Learn more about this toolset by reviewing the Working with Kinetic SDK and Using the Service Designer help articles.	This toolset broadens your ability to customize the Kinetic system. You expand Kinetic by creating innovative solutions for your unique business needs.

Configurator Management

Configurator Performance Tips

Feature	Benefit
You need to create efficient configurations with good performance. By following best practices, you can improve how your configurations run. Review these tips in the Configurator Best Practices help article.	Use configurator best practices to: • Improve the efficiency of your configurations. • Create configurations with better performance. • Select properties that improve how configurations run.

Service Management

Service Pro Integration

Feature	Benefit
The Service Pro to Kinetic integration includes a new flow allowing Kinetic MRP to see future demand for parts on planned Work Orders.	• Improved workflow allows Kinetic MRP to see future demand for parts on planned Work Orders. • Support for Serial and Lot Tracked parts. • Technician notes and pictures are brought to Kinetic. • Customer Signatures are brought to Kinetic. • Invoicing now follows standard Kinetic invoicing protocol. • You auto create a 'Service Call' and 'Service Job' and 'Material Details' and 'Labor Details' flow into the job automatically.

Material Requirement Planning

Planning by Revision, using parts marked as Track Inventory by Revision

Feature	Benefit
The 'Process MRP' app considers parts set to 'Track Inventory by Revision' for planning.	You can plan parts based on a revision, if a part includes multiple revisions.
ⓘ • You must mark a part to 'Track Inventory By Revision' and 'MRP Planning by Revision' in the 'Part' app. • You must install the 'Planning by Revision' license. 'Planning by Revision' is a new license, but 'Inventory by Revision' is a base functionality.	

Purchase Management

Add Contacts and Purchase Points when Linking a Supplier

Feature	Benefit
At the time of linking a supplier, you have the ability to link the supplier contacts and purchase points. ⓘ For more information about this feature, review the Linking Suppliers article. ⓘ This is an existing feature with improved logic in Kinetic.	If the original supplier record includes multiple contacts and purchase points, you can only add the contact(s) and purchase point(s) that you require on the newly linked supplier record.

Skipping Contact and Purchase Point Records when Linking a Supplier

Feature	Benefit
At the time of linking a supplier, you have the ability to skip the supplier contacts and purchase points that are tied to the supplier record you are linking. ⓘ For more information about this feature, review the Linking Suppliers article. ⓘ This is an existing feature with improved logic in Kinetic.	If the original supplier record includes multiple contacts and purchase points, you can skip the contact and purchase point records you don't want to add to the newly linked supplier. This prevents you from reviewing the same contact and purchase point records multiple times.

Customer Relationship Management

Skipping Contact and Ship To Records when Linking a Customer

Feature	Benefit
At the time of linking a customer, you have the ability to skip the customer contacts and ship-to (s) that are tied to the customer record you are linking. ⓘ This is an existing feature with improved logic in Kinetic.	If the original customer record includes multiple contacts and ship to records, you can only add the contacts and ship to(s) that you require on the newly linked customer record. This prevents you from reviewing the same contact and ship-to records multiple times.

Add Contacts and Ship To(s) when Linking a Customer

Feature	Benefit
At the time of linking a customer, you have the ability to link the customer contacts and ship to (s). ⓘ This is an existing feature with improved logic in Kinetic.	If the original customer record includes multiple contacts and ship to records, you can only add the contact(s) and ship to(s) that you require on the newly linked customer record.

Inventory Management

Track Inventory by Revision

Feature	Benefit
You can stock and track your inventory for manufactured and purchased parts by a revision. ⓘ This feature is out of the box and is not tied to a license.	You can have a different quantity of the same part in stock but the quantity is tied to a different part revision.

Inventory Advisor

Feature	Benefit
The 'Inventory Advisor' app includes the 'Part Attributes' search field allowing you to search for part attributes defined for a part in the 'Part' app.	You can narrow down your search by an attribute and personalize the 'Attribute Selection' search panel and column fields located on the 'Inventory

Feature	Benefit
You can also modify the 'Attribute Selection' search panel and column fields located on the 'Inventory Advisor List' card by using the 'System Class' option located in the 'Related To' field of the 'Dynamic Attribute Class' app. ⓘ To use these features, you must install the 'Advanced Unit of Measure' license.	Advisor List' card allowing you to display only fields you consider important for your part attribute search and 'Inventory Advisor' list.

Advanced Material Management

WIP and PCID

Feature	Benefit
You can report WIP inventory from an operation to a PCID and move the whole PCID into the next sequenced operation in the method of manufacture of a job, so you consume the WIP into the next operation for a specified PCID. ⓘ To use this feature, you must install the 'AMM' license.	You can take items that are in process on jobs and move them around the shop floor at one time, either on a pallet or in a box/container using a PCID.

Part WIP Transaction History Tracker

Feature	Benefit
Kinetic includes the 'Part WIP Transaction History Tracker' app that provides you with access to the overall transaction history of parts that are in WIP, including PCID and attribute set details. ⓘ To use the tracker, you must install the 'AMM' license.	You can track the transactional history of the movements of parts that are or were in WIP, regardless of the PCIDs usage.

Sales Management

Fulfilling Sales Orders with Make Direct Releases

Feature	Benefit
Kinetic allows you to reserve and release the order quantity for picking on sales orders that include non-stock parts. ⓘ To fulfill sales orders with 'Make Direct' releases, you must install the 'AMM' license.	You can fulfill the whole sales order even if a sales order release is set to 'Make Direct', which includes a part that is a non-stock item.

Financial Management

Transactional Descriptions in the Journal Listing Report

Feature	Benefit
The Journal Listing report generates descriptions of all the transactions performed on the 'Inventory' and 'WIP' and are included in the 'GL Journal' analysis of the 'Production Cost' and 'Cost of Sales'.	• The report gives you insight into the transactions that are hitting the accounting books by reviewing the real-time transactional descriptions. You can turn the description generation off if required. • Decreased number of generated 'GL Journal' lines. Therefore, less data storage required.

Supporting Multi-Site Processing for AP Invoice Load

Feature	Benefit
The 'AP Invoice Load' app now allows you to select a site when entering an invoice. ⓘ You can only select a site if you select the 'Multi-site Processing' check box in the 'Company Configuration' app and you	You can pay for the loaded invoices for a specific site.

Feature	Benefit
ℹ️ install the 'Multi-Site' license.	

Inactivate Site Segments and Accounts for a Company

Feature	Benefit
The 'Company Configuration' app includes the 'Use Multi-Site Processing' check box. The check box allows you to disable the generation of 'Chart of Accounts' in Kinetic. ℹ️ This check box is only available if you install the 'Multi-Site Processing' license.	This feature allows you to treat sites as financial entities and provides you with a mechanism of supporting multiple sites in the 'General Ledger' using a dedicated 'Chart of Accounts' segment, making 'sub-ledger' and 'GL' data that belong to different sites available in one company.

Filtering the Payment Proposal Report by Site

Feature	Benefit
You can generate the Payment Proposal Report for a specific site only.	You can narrow down the report data by a site only.

File Imported through the General Ledger Import Process Includes a Site Column

Feature	Benefit
The file imported using the 'General Ledger Import Process' app includes a 'Site' column.	You can only import entries for sites you have access to. Each import file includes a 'Site' column. However, the column is only relevant if you activate the 'Multi-Site' processing for a company and if you select the 'Book' in the 'General Ledger Import Process' app. Otherwise, the entered 'Site' value in the imported file is ignored.

System Management and Framework Tools

Mail Settings Maintenance

Feature	Benefit
Use **Mail Settings Maintenance** to enter the email services your company uses to send and receive email. You can set up email services using Modern SMTP, Legacy SMTP, Microsoft 365, and SendGrid. You can also define email throttles that alert you when email messages go above a threshold you define. See this application by going to **System Setup > Company/Site Maintenance > Mail Settings Maintenance**. Learn more about this application by reviewing the Entering Email Settings help article.	You can set up two email services that run within each company: • **System Mail Application** - Handles email messages sent through the system, such as password changes, exception messages, and BPM Send Email actions. • **Report Mail Application** - Handles email messages that have PDF reports attached to them.

ESignatures

Feature	Benefit
Digital electronic signatures, or ESignatures, ensure individuals who enter or update company records are authorized to make these changes. ESignatures are required in some industries, such as the medical device industry, to pass regulatory audits. Indicate which individuals can electronically sign records within User Account Security Maintenance. Then create Business Process Management (BPM) Method directives that require ESignatures when users update specific records, such as receipts. Then run the ESignature Audit Report to review the electronic signatures entered into the system. For more information, review these help articles: • Generating the ESignature Audit Report	Use ESignatures to: • Determine which users at your company have authorization to electronically sign records. • Set up which database transactions require ESignatures. • Require ESignatures when users save these database transactions. • Review and audit the ESignatures entered into the system.

Business Activity Query (BAQ) Designer

Feature	Benefit
The Business Activity Query (BAQ) Designer now has several features that previously were only in the Classic user interface. Some of these features include calculated fields, BAQ Searches, accessing display fields, copying subqueries, query parameters, query testing, and so on. The BAQ Designer also has enhancements that improve the usability of the interface. For more information, review these help articles: • Using the Query Designer • Selecting Display Fields • Defining BAQ Searches • Testing a Query • Closing All Tabs	Classic BAQ Designer features now in the Kinetic BAQ Designer include: • Improved Display Fields button and interface that make it easier to select the fields to display on your query. • Creating BAQ Searches that users can select in search panels and make the default search option. • The Calculated Fields Editor has a refined user interface that makes it easier to create calculated field expressions. • A subquery list where you define subquery types such as InnerSubQuery, CTE, TopLevel, and so on. • Ability to copy a subquery to use it as a base for a new subquery. • Ability to create a query parameter while entering table and subquery criterion statements. • Create queries that use Advanced Group By clauses which roll up data results and display the data within sets you define. • Create queries that use the PIVOT and UNPIVOT operators that move, or pivot, one table expression into another table expression. • The Run Query interface now has the Analyze Query and Test Query buttons that make these functions easier to access.

Extension and Companion Apps

Automation Studio

Feature	Benefit
Automation Studio Integration Epicor Automation Studio, powered by Workato®, connects Kinetic with external cloud-based tools that help you automate business workflows across cloud and on-premises applications. Automation Studio is designed for security, robustness, reliability, and high performance. With this release, the help system now includes more documentation to help you leverage Automation Studio: • Integrating with Automation Studio • Using Automation Studio • Creating with Automation Studio	Through Automation Studio you can: • Enable both business and IT users to efficiently build workflow automation. • Handle problems like integrating applications and data. • Update data automatically to ensure your records are current and accurate.
Integration with Functions Data transactions are controlled by services. Each services contains a series of methods, or functions, that perform a specific task like updating a part record. Use Function Maintenance to create custom services and their methods that then interact with the database. Create function libraries to extend how the system runs. You can now link Automation Studio recipes with Kinetic functions. You can then automate tasks that use these custom functions.	By integrating Automation Studio with Kinetic functions, you can: • Create a recipe that links to a custom function. • Automate a task that calls the custom function. • Run the custom service to update the database with the transaction.
Automation Studio Industry Examples To help you understand the capabilities of Automation Studio, you can review sample recipes on the Automation Studio Industry Examples site. Use this library of recipes to see the benefits of automating tasks and learn how to create them. Each recipe is thoroughly tested before it uploads	Use the Industry Examples site to: • Get ideas for recipes that pertain to your business function or industry. • See how recipes are designed. • Learn how Kinetic integrates with Automation Studio.

Feature	Benefit
to this site. A starting set of curated recipes is currently on the **Industry Examples** tab within Automation Studio. Epicor will continue to add recipes to this growing library.	

Collaborate

Feature	Benefit
You can now access Collaborate in a mobile browser. You can then track notifications and conversations in real time on any mobile device. View streams on Android, iPad, iPhone, and other mobile devices.	Mobile access gives a huge productivity boost for the dispersed/remote workforce. It also helps organizations with growing trend of Bring Your Own Device (BYOD). This enhancement drives engagement with new generational workforce.
Collaborate also has a new **Search** field. Use this field to search for a targeted port, conversation, or notification in your stream.	Search using keywords, mentions, and hashtags.
This version also introduces two filters - **unread** and **replied**.	These filters allow you to filter the stream to focus on unread post or posts you have replied to.

Epicor Web Access (EWA)

Feature	Benefit
Epicor Web Access (EWA) is now renamed as **Classic Web Access**. This site now only displays Epicor Commerce Connect (ECC) forms. Previously EWA displayed the smart client applications in a browser. Because these applications are now available in the Kinetic browser client, these older web applications are no longer supported. If you want to display applications in a browser, either continue to use the previous EWA version or switch to the Home Page in the browser client.	This streamlined site improves your access to Epicor Commerce Connect. Use Classic Web Access to quickly find the ECC applications you frequently use.

Feature	Benefit
For more information on Classic Web Access, review these guides: • **Kinetic On-Premise Installation Guide** - "Installing Classic Web Access" and "Configuring Classic Web Access" sections • **Kinetic Upgrade Release Guide** - "Upgrading Classic Web Access" section • **Kinetic Architecture Guide** - "Classic Web Access" section	

Software Developer Kit

Feature	Benefit
The Software Developer Kit (SDK) is a set of tools you use to create new Kinetic applications. These applications extend the functionality of the Kinetic system to better address the needs of your business area or industry.	Through the SDK, you can: • Create a new service that runs using the base business object methods. • Extend the database with a unique table. • Create a single view application. • Use Business Process Method (BPM) directives, Business Activity Queries (BAQs), UD Columns, Extended Properties, and other tools to further build on custom applications.

Country Specific Functionality

Singapore

Feature	Benefit
Processing Bank Payments You can make payments to suppliers via DBS and United Overseas Bank Limited (UOB). Review the Processing Bank Payments help article for more information.	You can generate export payment files in the following formats: • **Bulk Payment** - Banks provide various electronic bulk services that facilitate the sending and receiving of files and documents directly between the bank and your company. • **GIRO Payment** - General Interbank Recurring Order (GIRO) is an automated electronic payment service which allows you to make monthly payment to the billing organization (BO) from your bank account directly. All you need to do is to ensure that the designated bank account has sufficient funds every month. • **UOB Payment** - Allows you to make payments to your suppliers via United Overseas Bank Limited (UOB). • **DBS Payment** - Allows you to make payments to your suppliers via DBS Bank Limited (DBS).

Saudi Arabia

Feature	Benefit
Entering Debit or Credit memo without reference to original invoice For transactions that are VAT exempt, you can create debit or credit memos without reference to their original invoice numbers. Review the Entering the Debit or Credit Memo Without Original Invoice Reference help article for more information.	The debit or credit memos created are not in an electronic format. It has a separate Document type and legal number to differ from the regular taxable transaction.

Romania

Feature	Benefit
Using Duplicate Report Data Definition for AR Invoice to print fields from Person Contact Maintenance in AR Invoice You can duplicate system reports using Report Data Definition. Review the Creating Duplicate Report Data Definition help article for more information.	This feature helps create a duplicate Data Definition for AR Invoice to be able to print fields from Person Contact Maintenance in AR Invoice Form to meet requirements for CSF Romania.

United Kingdom

Feature	Benefit
Generating Plastic Tax Plastic tax is a new tax that applies to plastic packaging manufactured in, or imported in the United Kingdom that does not contain at least 30% recycled plastic. Review the Setting Up Plastic Tax, Generating AP Invoices for Imported Plastic Packaging Components and Generating the Plastic Packaging Tax Report help articles for more information. **Electronic Tax Reporting at Site level** Electronic Tax Reporting at Site level filters the tax reports by Site Tax code.	This feature helps in defining the amount of taxable and non-taxable plastic in a specific item. It also helps in identifying different parts containing plastic and also the costing operations related to those parts during purchase or manufacture. This feature extends the reporting capabilities for companies with complex legal structures. It also simplifies the integration with BisTrack and LumberTrack Epicor products.